

## Participant Materials

The 2003 Linkage Excellence in Management & Leadership Series

# Strategic Leadership

Featuring Peter Senge and Rosabeth Moss Kanter



Dear Participant:

Welcome to Linkage's 2003 Excellence in Management and Leadership Series. Today's program is a special two-hour series on Strategic Leadership. Part One: Strategy and Systems Thinking features Peter Senge and Part Two: The Keys to Leading and Managing Change features Rosabeth Moss Kanter. Dr. Senge is most widely known for translating the abstract ideas of systems theory into tools for a better understanding of economic and organizational change. Dr. Kanter is known internationally as a business leader, author, and expert in strategy, innovation, and leadership for change.

Key leadership themes Peter Senge will focus on during the presentation include:

- The differences between simple “linear” problems and “systemic” problems.
- How systems thinking is central to effective leadership and strategy development.

Key leadership themes Rosabeth Moss Kanter will focus on during the presentation include:

- Why kaleidoscopic thinking is critical to effectively managing change.
- Techniques and tips for leading change and the critical skills needed to be a successful change agent.
- The importance of building coalitions and inspiring confidence.

These participant materials have been designed to complement your conversation with Peter Senge and Rosabeth Moss Kanter. Use them to record your notes, ideas, questions, and insights. At the end of the program, you will be asked to submit questions directly to Dr. Senge and Dr. Kanter via fax, telephone, and/or email.

Learning is an activity that requires more than passively watching a speaker. Simply watching today's program will neither instill leadership knowledge or skills, nor result in an immediate change in your organization's culture and strategic positioning.

Learning requires the **active** engagement of your mind and spirit - the motivation and drive to reflect, apply, practice, and experiment.

## About Linkage

Linkage, Inc. is a leading provider of leadership and management development training programs, services, and products. More than 100,000 executives and management professionals have attended a Linkage institute, conference, workshop, or corporate education program. Linkage also provides assessment, consulting, and research services to Fortune 500 companies and other leading organizations. Founded in 1988, Linkage is headquartered in Burlington, Massachusetts, with regional offices located in Atlanta, Brussels, London, Minneapolis, and San Francisco. In both 1997 and 1998, Linkage was honored as one of the "Inc. 500 Fastest Growing Private Companies in the United States."

## Distance Learning

Thank you for your participation in today's Distance Learning session: "Strategic Leadership" featuring Peter Senge and Rosabeth Moss Kanter.

As a participant of this session, you may apply your fee toward the remainder of the 2003 Excellence in Management and Leadership Series. Upcoming sessions include:

- **Larry Bossidy** on *Execution*, October 27, 2003
- **Dan Goleman** on *Leadership and Emotional Intelligence*, November 19, 2003
- **Louis Gerstner** on *Organizational Transformation*, December 2, 2003

To order the remainder of the series or to speak to a representative, contact Linkage Customer Service at 781-402-5555 or visit:

[http://www.linkageinc.com/disl/satellite\\_about.shtml](http://www.linkageinc.com/disl/satellite_about.shtml).

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**SECTION 1**

**Satellite Program Materials**

## What You Will Learn

There is a strategy in being a strategic and effective leader in an organization. Both Peter Senge and Rosabeth Moss Kanter offer their years of expertise on the “how to” of strategic leadership during this two-hour Satellite Session. Dr. Senge emphasizes that the best leaders nurture innovative ideas while simultaneously recognizing the interrelationships and patterns that make up the whole organization. This theory, essentially framed around Systems Thinking, is the core message that Senge articulates to the audience, emphasizing that organizational interdependence and knowing your system can lead to effective change initiatives. Rosabeth Moss Kanter provides an excellent transition from Senge’s theories on systems thinking, in that Kanter provides the techniques and proven approach on how to communicate and execute change initiatives in your organization. Kanter focuses on building the capabilities of a leader, including adaptability, conviction, confidence, and empowerment.

## Introduction and Basic Premises

Peter Senge speaks specifically about systems thinking and how it directly relates to the practice of strategic leadership and organizational learning. Senge will focus on different types of leadership styles, namely conceptual leadership and reflective leadership. Additionally, Senge will discuss the overall complexity in being a leader while trying to think in “systems thinking” terms and how that complexity can be overcome in the state of change. Rosabeth Moss Kanter presents concrete skills for change masters, emphasizing organizational environment, preparation, and communicating a vision. Kanter provides a stimulating analogy in “Kaleidoscope Thinking” as a way of constructing a set of elements that everyone else sees, but then reassembling those floating bits and pieces into an enticing new possibility.

## Question-and-Answer Session

- If you are participating only in the live presentation of this program, complete the fax form, send an e-mail, or call your questions to Dr. Senge or Dr. Kanter using the question sheet **on page 39**.
- If you are participating in a post-broadcast program, share your questions with your seminar coordinator and your colleagues during that time.

## When the Session Has Concluded

- Your feedback is valuable in ensuring the integrity of future programs. We take pride in providing relevant, thought-provoking, and enlightening programs - and we rely on you to help make this happen. Please complete your participant evaluation form and fax it to: 1-877-892-0170 (within U.S.) or 1-646-349-3661 (outside U.S.).

- To further reinforce your understanding of today's information, as well as hone other aspects of your leadership skills, complete the recommended Post-Broadcast Activities that begin on page 28.

### Biography: Peter Senge

Peter M. Senge is a senior lecturer at the Massachusetts Institute of Technology. He is also founding chair of the Society for Organizational Learning (SoL), a global community of corporations, researchers, and consultants dedicated to the interdependent development of people and their institutions. He is the author of the widely-acclaimed book, *The Fifth Discipline: The Art and Practice of The Learning Organization* (1990) and, with colleagues Charlotte Roberts, Rick Ross, Bryan Smith and Art Kleiner, co-author of *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization* (1994), and a fieldbook *The Dance of Change: The Challenges to Sustaining Momentum in Learning Organizations* (March, 1999), also co-authored by George Roth. In September 2000, his fieldbook on education was published, the award-winning *Schools That Learn: A Fifth Discipline Fieldbook for Educators, Parents, and Everyone Who Cares About Education*, co-authored with Nelda Cambron-McCabe, Timothy Lucas, Bryan Smith, Janis Dutton, and Art Kleiner.

Dr. Senge has lectured extensively throughout the world, translating the abstract ideas of systems theory into tools for better understanding economic and organizational change. His areas of special interest focus on decentralizing the role of leadership in organizations so as to enhance the capacity of all people to work productively toward common goals. Dr. Senge's work articulates a cornerstone position of human values in the workplace; namely, that vision, purpose, reflectiveness, and systems thinking are essential if organizations are to realize their potentials. He has worked with leaders in business, education, health care and government.

*The Fifth Discipline* hit a nerve deep within the business and education community by introducing the theory of learning organizations. Since its publication, more than one million copies have been sold worldwide. In 1997, *Harvard Business Review* identified it as one of the seminal management books of the past seventy-five years. Feature articles in *Business Week*, *Fortune*, *Fast Company*, *Sloan Management Review*, and other leading business periodicals have highlighted the work of Dr. Senge and his colleagues at MIT and SoL.

*The Fifth Discipline Fieldbook* (which has sold over 358,000 copies) was developed in response to questions from readers of *The Fifth Discipline* who wanted more help with tools, methods, and practical experiences in developing enhanced learning capabilities within their own companies. *The Dance of Change* is based on more recent experiences of companies developing learning capabilities over many years and the strategies leaders develop to deal with the many challenges this work entails. Dr. Senge has also written articles published in academic journals and the business press on systems thinking in management.

The *Journal of Business Strategy* (September/October 1999) named Dr. Senge as one of the twenty-four people who had the greatest influence on business strategy over the last one hundred years. *The Financial Times* (2000) named him as one of the world's "Top Management Gurus." *Business Week* (October 2001) rated him as one of "The Top (Ten) Management Gurus."



Peter Senge received a B.S. in engineering from Stanford University, an M.S. in social systems modeling, and a Ph.D. in management from MIT. He lives with his wife and their two children in central Massachusetts.

### **Biography: Rosabeth Moss Kanter**

Rosabeth Moss Kanter is an internationally-known business leader, best-selling author, and expert on strategy, innovation, and leadership for change. She is the Ernest L. Arbuckle Professor of Business Administration at Harvard Business School. She advises major corporations and governments worldwide, and is the author or co-author of fifteen books, including her latest book, *Evolve!: Succeeding in the Digital Culture of Tomorrow*. Other award-winning bestsellers include *Men & Women of the Corporation*, *The Change Masters*, *When Giants Learn to Dance*, and *World Class: Thriving Locally in the Global Economy*. In 2001 she received the Academy of Management's Distinguished Career Award (the association's highest annual award) for her contributions to management, and in 2002 she received the World Teleport Association's Intelligent Community Visionary of the Year Award.

Considered one of the most prominent business thought leaders in the world and well-known as a dynamic speaker, she has shared the platform at major events with Prime Ministers, Presidents, and CEOs in many countries, and she appears often on radio and television. In addition to serving on company boards, she co-founded Goodmeasure Inc., whose consulting clients have included some of the world's best companies. Goodmeasure is currently developing electronic Web-based versions of Kanter's leadership and change tools to help embed them in the daily work of organizations everywhere.

Dr. Kanter's current work focuses on the nature of winning streaks, losing streaks, and leadership for turnarounds with evidence from businesses, major league sports teams, inner-city schools, and political leaders, as featured in her lead article in the June 2003 issue of *Harvard Business Review*. She is interested in the development of new leadership for the digital age – how to guide the transformation of large corporations, small and mid-sized businesses, health care, government, and education as they incorporate new technology, create new kinds of alliances and partnerships, work across boundaries and borders, and take on new social responsibilities. In 1997-1998, she conceived and led the Business Leadership in the Social Sector (BLSS) project under the auspices of the Harvard Business School's Initiative on Social Enterprise. The project involved national leaders, including CEOs, Senators, Governors, and Senator (then First Lady) Hillary Clinton, in dialogue about public-private partnerships for change, the launch of a BLSS video series, and a national call to action in collaboration with business associations, an activity she continues as Senior Adviser to IBM's award-winning Reinventing Education initiative. From 1989-1992, she also served as Editor of the *Harvard Business Review*, which was a finalist for a National Magazine Award for General Excellence in 1991. She joined the Harvard Business School faculty in 1986 from Yale University, where she held a tenured professorship from 1977 to 1986.

Dr. Kanter has received twenty-one honorary doctoral degrees and over a dozen leadership awards. She has been named to lists of the "fifty most influential business thinkers in the world" (Accenture, ranked #11), the "one hundred most

important women in America” (Cosmopolitan), and the “fifty most powerful women in the world” (Times of London). She serves on many civic and non-profit boards, including City Year, the fourteen-city national service program that was the model for Americorps and is now expanding to South Africa and other countries. Her public service activities span local and global interests. Dr. Kanter served as a member of both the Board of Overseers for the Malcolm Baldrige National Quality Award as well as the Massachusetts Governor’s Economic Council (for which she co-chaired the International Trade Task Force). In addition, she led the effort to establish a Year 2000 Commission for legacy projects for Boston. She is a judge for the Ron Brown Award for Corporate Leadership given at the White House and a Fellow of the World Economic Forum. She also serves on the Massachusetts Convention Center Authority Board and on U.S. Secretary of Labor Elaine Chao’s Work Force Council on the skills gap for the Twenty-First Century.

**Pre-Broadcast Activities/Discussion****Reflection on Systems Thinking**

How would you define a system?

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What does it mean to be a systems thinker? Why might this be considered a critical leadership attribute?

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**Common Missteps in Change Efforts*****Step 1***

Think back through some of the work-related change efforts that you have been involved in, whether as a leader or receiver of change. What have been some of the errors or missteps in these efforts: the poor implementation decisions, actions, and behaviors that hurt or derailed the change?

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***Step 2***

In a small group, use your individual lists to generate a group of common missteps in change efforts. Be prepared to share your lists.

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### **During This Program**

- Participate!
- Submit questions to be addressed by Dr. Senge and Dr. Kanter during the question-and-answer session. They will respond to questions in the second half of their presentations. To submit questions, either complete the fax form found on **page 39**, submit an e-mail, or call in when prompted during the program.
- Use the following Participant Materials as an additional resource to Dr. Senge's and Kanter's presentations. Make notes on each presentation in the space provided.

## **Senge Participant Materials**

### **The Nature of Complexity**

Truly complex problems are distinguished along three dimensions:

- Dynamic complexity: cause and effect are not close in time and space

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- Social complexity: many stakeholders with different aims and worldviews

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- Generative complexity: the future is not an extrapolation of the past; solutions from the past will not suffice for the future

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**Strategy as a Learning Process**

Traditional approaches to strategy suggest it is all about getting the right answer versus enhancing an organization's capacity to learn how to build value more rapidly and effectively.

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**Integrating Strategy Development and Strategy Enactment**

Traditional approaches to strategy fragment "the head" and "the hand:" setting strategy is the job of top management and "implementing" is the job of everyone else. This would be like figuring out that I want to walk and leaving the implementing to someone else. Is it any surprise that so many brilliant strategies never get implemented? An alternative view is that good strategy emerges from many levels in the organization and that strategic change and operational change are inseparable. This fundamentally redefines the job of executive management; their job is much more than just "getting the strategy right."

**Conceptual Leadership**

Most people in positions of authority focus on getting others to "buy in" to their strategies versus leaders who can help others understand complex issues and thereby contribute to increasing collective intelligence and shared vision.

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**Reflective Leadership**

Since no strategy is ever "right," the key between good strategy and poor strategy stems from the openness and ability to learn of those espousing a strategy. Leaders need to develop the capacity to bring to the surface the mental models that lie behind an espoused strategy and to continually challenge those mental models - including their own favored assumptions.

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**Seeing the Larger Context**

As conceptual (systems thinking) and reflective capacities develop in an organization, people become able to discern fundamental shifts in their larger environment. This will become essential in the future, as social and environmental imbalances redefine the context for businesses and perhaps even their role.

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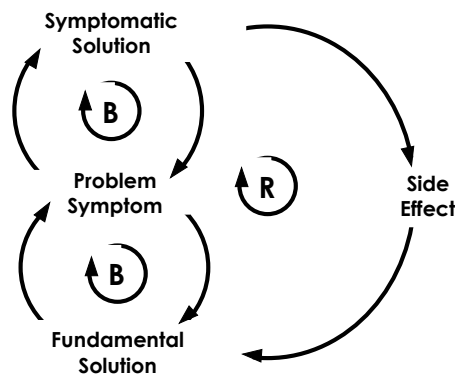
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### Systems Archetypes

The following model is titled “Shifting the Burden Systems Archetype.” Dr. Senge feels the insight of the “budding, managerial system-thinking field” is that certain types of systemic structures recur. Countless systems grow for a period, then encounter problems and cease to grow (or even collapse) well before they have reached intrinsic limits to growth. Many other systems get locked in runaway vicious spirals where every actor has to run faster to stay in the same place. Still others lure individual actors into doing what seems right locally, yet which eventually causes suffering for all.

### Shifting the Burden Systems Archetype



In the “shifting the burden” template, two balancing processes (B) compete for control of a problem symptom. Both solutions affect the symptom, but only the fundamental solution treats the cause. The symptomatic “solution” creates the additional side effect ® of deferring the fundamental solution, making it harder and harder to achieve.

Some of the systems archetypes that have the broadest relevance include:

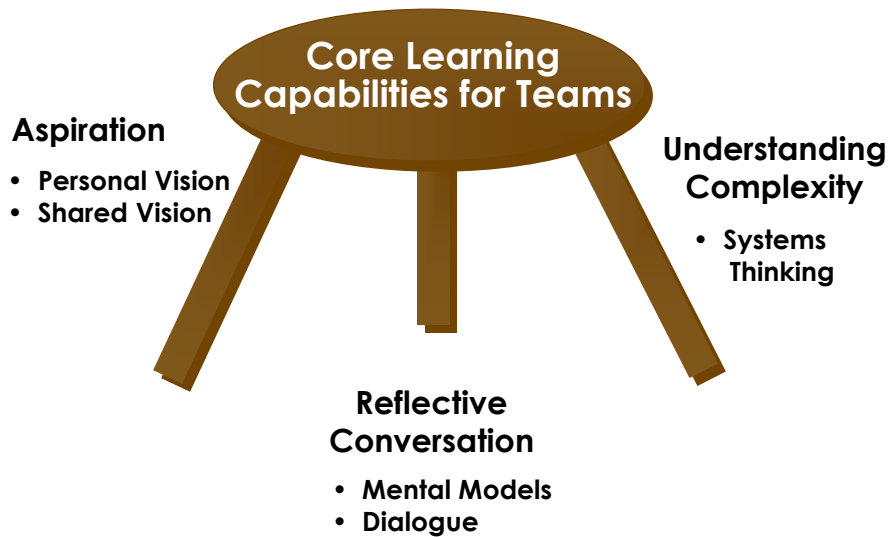
- Balancing Process with Delay
- Limits to Growth
- Shifting the Burden
- Eroding Goals
- Tragedy of the Commons
- Growth and Underinvestment

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**Model: Core Learning Capabilities for Teams*****Systems Thinking***

This encompasses a large and fairly amorphous body of methods, tools, and principles, all oriented to looking at the interrelatedness of forces and seeing them as part of a common process. This is participative at all levels of an organization aligned through the common understanding of a system.

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### ***Mental Models***

This includes images, assumptions, and stories that we carry in our minds of ourselves, other people, institutions, and every aspect of the world. Human beings cannot navigate through the complex environments of our world without cognitive “mental models,” which, by definition, are all flawed in some way.

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### ***Shared Vision***

A successful strategy for building shared vision will be built around several key precepts:

- The organization having a destiny
- Defining your aspirations and reasoning for why your industry/position came into being
- Visions which tap into an organization’s deeper sense of purpose and being able to communicate that purpose
- Collective sense of the organization’s underlying purpose
- Individuals at every level articulate what matter to them and are heard by senior management and one another
- “Creative tension” or personal mastery, where concepts emerge when we hold clear pictures of our vision juxtaposed with current reality

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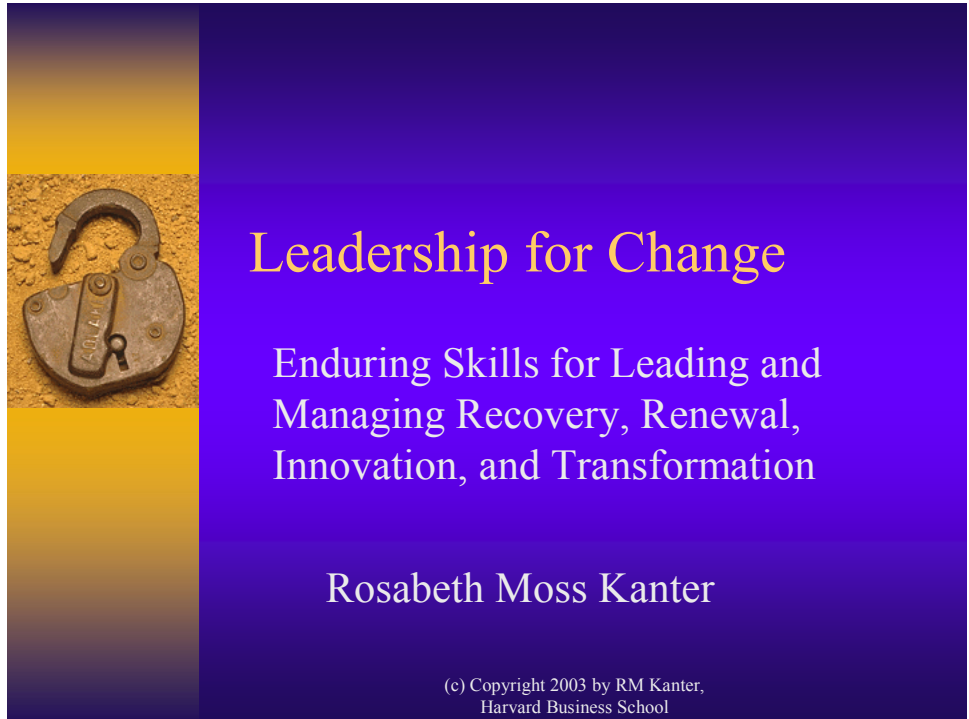
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**Kanter Participant Material**



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## Seven Skills of Changemasters

- ♦ Tuning in, facing facts, sensing opportunities
- ♦ Finding new approaches: kaleidoscope thinking
- ♦ Setting themes, articulating compelling visions
- ♦ Finding supporters, crafting coalitions
- ♦ Developing projects, nurturing the working team
- ♦ Mastering the middles, persisting and persevering
- ♦ Making heroes, sharing credit and recognition

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## Tuning into the Environment

- ◆ Overcoming denial -- facing facts
- ◆ Sensing opportunities -- scouting ideas
- ◆ Performance measures:
  - against the Past
  - against Peers
  - against Potential

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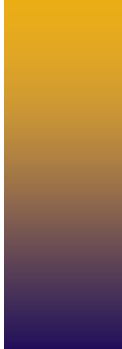


# Kaleidoscope Thinking

- ◆ Roots of creativity: shuffling the pieces, challenging assumptions
- ◆ Self-scrutiny versus focus on *them*: avoiding blame, imitation
- ◆ “Far a-field trips”
- ◆ Nothing fixed, nothing sacred

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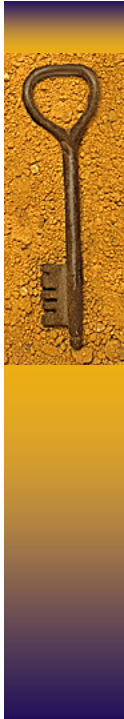


## Setting Themes, Common Vision

- ◆ Themes, not scripts: lessons from improv
- ◆ Elements of vision:
  - Dream
  - Destination
  - Prize
  - First steps
- ◆ Test: *Does my passion match my aspiration?*

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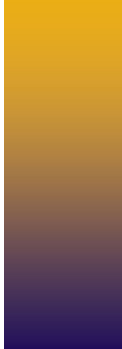
## Finding Backers & Supporters: Crafting Coalitions

- ◆ Sponsors & investors: resources, information, support (legitimacy, access)
- ◆ “Community organizing”: key stakeholders, snowball effects
- ◆ Process:
  - Planting seeds
  - Horse trading
  - Sanity checks

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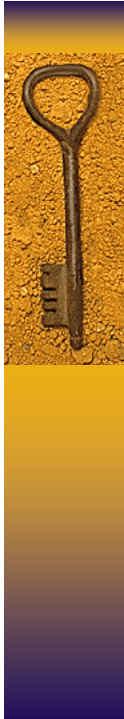


## Nurturing the Working Team

- ◆ Developing projects: team selection to team ownership
- ◆ Team = differentiated individuals agreeing to combine talents
- ◆ Socializing
  - “*Those 15 minutes are a big waste of time and absolutely essential for winning.*” -Coach of UNC’s record-breaking women’s soccer team
- ◆ Leader role: boundary patrol

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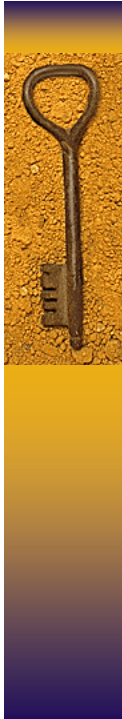


# Mastering the Middles: Persisting and Persevering

- ◆ Kanter's Law: *"Everything can look like a failure in the middle"*
- ◆ Predictable problems of middles:
  - Forecasting problems (run out of X)
  - Unexpected obstacles
  - Loss of momentum; team gets tired
  - Critics surface

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# Celebrating Success

- ◆ Making heroes
- ◆ Sharing credit and recognition
- ◆ Kanter's second law: "*Change is not a decision, it's a campaign.*" Keep campaigning

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**Post-Broadcast Activities**

Complete and submit the participant evaluation form found at:  
[http://www.linkageinc.com/training/satellites/satellite\\_evals.shtml](http://www.linkageinc.com/training/satellites/satellite_evals.shtml) or at the end of  
your participant materials.

**Activity 1: Reconsidering Your Pre-Broadcast Work**

- Return to your pre-broadcast questions and answers beginning on page 11.

Examine your definitions of a system and your reflection on systems thinkers. How would you reverse or add to your own answers in light of Dr. Senge's presentation?

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What might Dr. Senge or Dr. Kanter say if they were to comment on the list of common missteps in change efforts that you generated?

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What are the most useful pieces of advice or tactics that you heard for successfully leading change in the future?

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What other ideas, concepts, or themes from the broadcast resonated with you?

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**Activity 2: Five Steps in Constructing a Systemic Model**

**Step 1** First as an individual and then as a team, identify several systemic problems or opportunities you face in your work. Use this space to capture your individual list of systemic problems or opportunities.

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Your team's list of systemic problems or opportunities.

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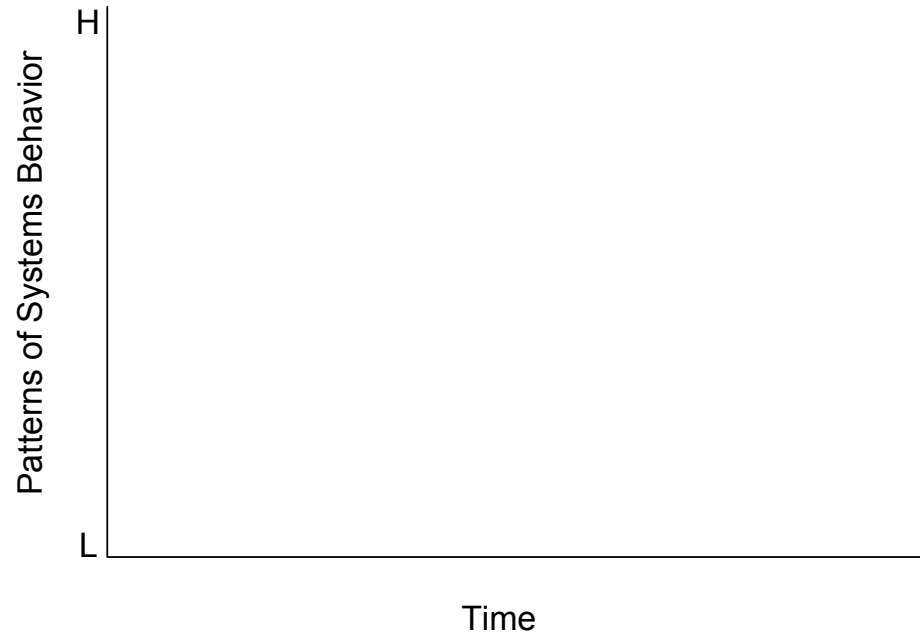
**Step 2** As a team, agree on one systemic problem or opportunity and as a team, craft one or two sentences that encapsulate the story of this system.

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**Step 3** Using “post-it” notes, brainstorm 12-25 variables that are part of your systemic story (one variable per “post-it” note).

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**Step 4** Graph the behavior of this system over time. Depending on your systemic story, time could be in hours, days, weeks, months, years, etc.



**Step 5** Reflect: What does this work teach you about the problem and about both effective and ineffective approaches to resolving it? What does this work teach you about how to approach other complex problems you face? (What do you need to do/avoid doing when working on such problems?)



### Activity 3: Stakeholder Commitment Chart

#### ***What It Is***

A planning form for building the necessary support for a change initiative.

#### ***What It Can Do***

This tool can help you

- Determine the critical mass necessary to implement a change successfully.
- Identify the specific individuals and groups who are stakeholders of a proposed change.
- Develop a plan to build the required commitment of those most affected by a change.

#### ***How It Works***

**Step 1** Use the worksheet on page 36.

**Step 2** In the first column, list all the individuals and groups who are stakeholders of the proposed change, such as:

- Key customers or anyone who relies on the outputs of the process, structure, competencies, culture, etc., that is being changed
- Key suppliers
- Those who own or are responsible for the process, group, etc., being changed
- Anyone you feel could subvert implementation (by withholding support or sabotaging the initiative)
- Anyone else you feel could contribute to your success
- Diverse or underrepresented groups (e.g., administrative staff)

**Step 3** One by one, working across, place an “X” in the columns (3-7) that denotes this person or group’s current level of commitment.

- **Makes It Happen** means this person/group has line or team responsibility for making the change happen.
- **Helps** means this person/group can provide critical resources, information, or expertise.

- **Permits** means this person/group will stay out of the way.
- **Questions** means this person/group has questions, reservations, or concerns or is actively resisting the change.
- **Unaware** means this person/group is not aware or part of the change effort.

**Step 4** Working across, place a black dot (●) in the columns (3-7) that captures the level of commitment needed for successful implementation.

**Step 5** If you find it useful, draw an arrow from the “X” to the dot for each person or group. These arrows represent the gaps you must close to have a critical mass of commitment for the change initiative.

**Step 6** In the final column, work with a partner to identify and write down any strategies or action items you plan to take to shift the commitment level of the two to three individuals or groups that have the largest gaps to close between current and desired commitment level. Communication, involvement, and education are important strategies.

### ***Some Things to Consider***

- Critical mass is the minimum commitment required from stakeholders. Do not set a goal of achieving total commitment from everyone. Waiting for everyone to get on board is both unnecessary and unrealistic. If you hold out for total commitment, your change may never happen.
- This is a tool for assessment and planning only. Failing to carry out your proposed actions and strategies will surely lead to downstream implementation obstacles.
- Avoid (a) identifying only those in formal positions of power as stakeholders, (b) making generous assumptions about people’s actual level of current support, and (c) neglecting to ask stakeholders their opinions about the effort.

### ***Example***

The senior leadership team of a mid-sized regional HMO was going through its annual planning cycle. They decided, based on customer, staff, and physician feedback, that their information systems were not giving the organization what it needed. There was too much down time, too many work-arounds, and too much inaccurate data produced. The HR department was so frustrated that it had even started to develop its own system.

To implement their new strategic thrust, the senior leaders discussed setting up a team to redesign all the information systems in the company. As one of their first steps, they created a stakeholder commitment chart to survey what the team might face.

| <b>Stakeholder</b>        | <b>Specific Role</b> | <b>Makes It Happen</b> | <b>Helps</b> | <b>Permits/<br/>Stays Out<br/>of Way</b> | <b>Questions<br/>and/or<br/>Resists</b> | <b>Unaware</b> | <b>Action Steps<br/>to Shift<br/>Commitment</b> |
|---------------------------|----------------------|------------------------|--------------|--|---|----------------|---|
| VP of operations          |                      |                        |              | ←—————X                                  |   | X              | Include in development meeting 6/15             |
| IS manager                |                      |                        | ←———X        |  |   |                | Add to redesign team                            |
| Union president           |                      |                        |              |  | ←——X                                    |                | Involve in selecting redesign team              |
| Facilities manager        |                      |                        |              | ←—————X                                  |   | X              | Attend methodologies overview                   |
| Information Systems group |                      |                        | ←———X        |  |   |                | Attend overview; consult them; select           |
| Human Resources           |                      | X→                     |              |  |   |                | Renegotiate their role                          |
| Sally                     |                      |                        |              | ←—————X                                  |   | X              | Get on redesign team                            |
| Operations group          |                      |                        |              |  | ←———X                                   | X              | Have opinion leaders at overview                |
| Medical chiefs            |                      |                        |              |  | ←——X                                    |                | Special overview/Q&A session                    |
| Department supervisors    |                      |                        |              | ←——X                                     |   |                | Involve in data gathering and implementation    |
| Accounting department     |                      |                        |              | ←—————X                                  |   | X              | Involve in analyses                             |

**X = Current Commitment      ● = Desired Commitment**

**Worksheet: Stakeholder Commitment Chart**

| 1<br>Stakeholder       | 2<br>Specific<br>Role | 3<br>Makes It<br>Happen | 4<br>Helps | 5<br>Permits/<br>Stays<br>Out of<br>Way | 6<br>Questions<br>and/or<br>Resists | 7<br>Unaware | 8<br>Action Steps<br>to Shift<br>Commitment |
|------------------------|-----------------------|-------------------------|------------|---|-------------------------------------|--------------|---|
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
|                        |                       |                         |            |   |                                     |              |   |
| X = Current Commitment |                       |                         |            | ● = Desired Commitment                  |                                     |              |   |

**Activity 4: Action Planning**

- Identify one step that you will take to enhance your effectiveness as a systems thinker:

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- Identify one practice, tool, or behavior that you commit to adopting and applying in the change initiatives that you lead or implement:

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## **SECTION 2**

### **Forms**

## Question Sheet

Use this form to write your question for Dr. Senge or Dr. Karter or for discussion among your colleagues. Please write legibly.

**Name (optional):**

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**Organization:**

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**Location:**

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**Your question (25 words or fewer):**

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Fax 1-877-892-0170 (from within U.S.)  
Fax 646-349-3661 (from outside U.S.)

Email: **leadership2003@linkage-inc.com**

Tel 1-800-489-8814 (from within U.S.)  
Tel 801-303-7412 (from outside U.S.)

# LINKAGE MANAGEMENT & LEADERSHIP EVALUATION FORM

PLEASE RETURN THIS FORM TO YOUR SITE COORDINATOR OR FAX TO 781-993-1402.

NAME \_\_\_\_\_ TITLE \_\_\_\_\_

ORGANIZATION \_\_\_\_\_

**Please indicate functional area (only circle one):**

Finance   Human Resources/Organizational Development   Manufacturing/Operations   Marketing   R&D   Sales

Other (specify) \_\_\_\_\_

**How many people do you have reporting to you (include all levels)? Number:** \_\_\_\_\_

**Please indicate your job level (only circle one):**

☐ President or Officer   ☐ Vice President   ☐ Director   ☐ Manager/Supervisor   ☐ Individual Contributor

**1) Please indicate a rating for each of the statements below by checking the appropriate box.**

|   | Strongly Disagree        | Somewhat Disagree        | Somewhat Agree           | Strongly Agree           |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| The length of the presentation was ideal  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| As a result of participating in this program, I will be more effective in my role | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| The participant materials were useful   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| The Q&A session was valuable  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**2) Please give a general overall comment about the program.**

\_\_\_\_\_  
\_\_\_\_\_

**3) Any suggestions on what we can do to improve?**

\_\_\_\_\_  
\_\_\_\_\_

**4) Can we use any of these comments for promotional purposes (including name and organization)?**   YES   NO

**5) On a scale of 1-10 (10 = Outstanding), how would you rate this session?**

Rating: \_\_\_\_\_

**6) Which speakers are you most interested in seeing at the next Linkage Satellite (Distance Learning) Learning Series? (Please rate your top five, "1" being most interested)**

|                    |                    |                        |
|--------------------|--------------------|------------------------|
| ___ James Champy   | ___ Michael Dell   | ___ Warren Bennis      |
| ___ Larry Bossidy  | ___ Deborah Tannen | ___ Maya Angelou       |
| ___ Steve Jobs     | ___ Stephen Covey  | ___ Margaret Wheatley  |
| ___ Michael Porter | ___ Tom Peters     | ___ Francis Hesselbein |
| ___ Phillip Knight | ___ John Scully    | ___ Michael Hammer     |
| ___ Noel Tichy     | ___ Louis Gerstner | ___ Gary Hamel         |
|                    |                    | ___ Other _____        |

PLEASE RETURN THIS FORM TO YOUR SITE COORDINATOR OR FAX TO 781-372-1678.





Linkage, Inc. is a global organizational development company that specializes in leadership development.

Serving the public and private sectors, the Company provides clients around the globe with integrated solutions that include strategic consulting services, customized on-site training experiences, tailored assessment services, and benchmark research.

With a relentless commitment to learning, Linkage also offers a full range of conferences, institutes, summits, public workshops, and distance learning programs on leading-edge topics in leadership, management, HR, and OD. More than 100,000 leaders and managers have attended such a Linkage program since the Company's founding in 1988.

Linkage is headquartered in Burlington, Massachusetts, with regional offices in Minneapolis, Atlanta, San Francisco, London, and Brussels. On two occasions, Linkage has been named to the *Inc. 500*, a list of the fastest growing private companies in the United States.



#### **ABOUT LINKAGE**

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## **LINKAGE TRAINING & EDUCATIONAL SERVICES**

At Linkage Training, our mission is to provide you with high quality, action-oriented, and innovative training experiences. All of our workshops are practical, tool-based learning sessions facilitated by Linkage consultants with relevant experience in the specific topic area. Linkage training programs offer:

#### **LEADING-EDGE THEORY**

Linkage's programs are developed with the latest research from the fields of OD, HR, and Leadership Development.

#### **PRACTICAL TOOLS**

Every Linkage program includes a set of proven and practical tools which are easily applied to increase the participants' confidence in specific skill sets such as coaching, team leadership, and organizational change.

#### **HANDS-ON EXPERIENCE**

Linkage programs are designed to be highly interactive workshops that integrate role-plays, simulations, case studies, and application planning based on real-life business challenges.

#### **SKILLED FACILITATION**

Linkage's facilitators are industry-experts with several years of consulting experience in the fields of leadership development, HR consulting, and OD. Their real-world experience brings a valuable perspective to each program.

#### **FLEXIBLE DELIVERY OPTIONS**

Linkage Training strives to meet your learning needs by offering our workshops as open-enrollment public workshops, on-site programs, or licensed programs that can be delivered by your organization's trainers. Additionally, Linkage consultants can custom-design learning sessions ranging from a half-day module to a multi-day leadership development experience to meet your specific learning objectives.



# LINKAGE TRAINING & EDUCATIONAL SERVICES

## PUBLIC WORKSHOPS

We offer 30 open-enrollment public workshops that take place over the course of one to three days. Each workshop addresses a leading-edge topic in leadership, management, HR, or OD and is offered on multiple occasions throughout the year in major cities including Boston, Chicago, San Francisco, Atlanta, New York, Washington, DC and Dallas. Many of these workshops are also offered through Linkage International in London, Brussels, Amsterdam and other locations throughout Europe.

### Linkage Training's public programs include:

- **Skill Building Programs** – Targeted training for the development of critical skills and abilities such as *Systems Thinking*, *Designing and Implementing Leadership Development Programs*, *Introduction to Organizational Development*, and *Influencing for Impact* to name a few.
- **Certificate Programs** – Integrated courses of study for professional development such as *The Organizational Development Certificate Program*, *The HR Consulting Skills Certificate Program*, *The Certificate for Leadership Development Professionals*, and *The Management Skills Certificate Program*.
- **Immersion Programs** – Intensive, hands-on, and high-impact learning experiences such as *Pathways: The Linkage Executive Leadership Program*, *Leading Through Communication: The Linkage Communication Clinic*, and *The Coaching Leaders Certification Program*.
- **Train-The-Trainer Programs** – Certification courses for delivering special training programs such as *Leading Organizational Transition* offered in partnership with William Bridges & Associates, and *Leading in Challenging Times: Shackleton's Way*.

## CUSTOM-DESIGNED LEARNING SESSIONS

Linkage's experienced instructional designers and consultants can evaluate your business challenges, assess your audience learning needs, and design and develop a learning session to meet your specifications and budget. A Linkage custom-designed learning session will fit your unique learning objectives and can also incorporate:

- Multi-rater assessments and development plans
- External keynote speakers on relevant business topics
- Internal keynote speakers on key organizational issues
- Action learning team projects on real-life business challenges

## ON-SITE PROGRAMS

If your organization would like to send several employees to a Linkage skill-building workshop, you can arrange for an expert Linkage facilitator to deliver the program at your site. On-Site programs can be delivered off-the-shelf (as is), tailored (custom role plays or case studies added), or as a combination of two or more public programs (i.e., Day 1 from *Consulting Skills for HR Professionals* and Day 2 from *Systems Thinking*).

### On-Site programs offer:

- Significant cost savings (minimal travel and expenses)
- Customization (programs tailored to your specifications)
- Convenience (programs delivered when, where, and how you want)
- Immediate application (participants apply skills and tools to shared business challenges)

## LICENSED PROGRAMS

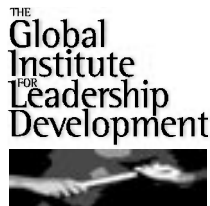
If your organization has identified a business need to deliver focused skill-building programs for a large audience (e.g., 50 or more employees), licensing a Linkage training program may be the solution for you. Licensing a Linkage training program provides an efficient and cost-effective way to offer a dynamic learning experience to your employees delivered by your own facilitators. Linkage can also offer an on-site train-the-trainer session, which will give your facilitators the skills needed to roll-out the program across your organization.

### Licensing a Linkage program can offer your organization:

- Resource utilization (leverage and equip your facilitators)
- Greatly reduced cost (avoid travel and expenses by delivering programs at each of your sites)
- Convenience (programs delivered when, where, and how you want)
- Consistency of delivery of courseware across your training population

## LINKAGE CONFERENCES, SUMMITS, AND INSTITUTES

### *Experience the Power of Our 2003 Lineup for Yourself!*



OCTOBER 26-31, 2003 • PALM DESERT, CA

In its 7th year, with over 2,500 alumni, *The Global Institute for Leadership Development* (GILD) is an intensive 5.5 day leadership immersion program designed to develop high potentials into exceptional leaders. In a time where it is critical for leaders and organizations to hit business goals and targets, it is also imperative that we get back on track with our core values. Designed to foster the development of well-rounded, responsible and successful leaders, GILD provides a world-class accelerated learning experience that combines expert instruction, real-time business application, and social awareness in a pragmatic and hands-on environment. GILD also provides specific programming for new managers, emerging leaders, senior leaders and leadership teams. GILD's world-class faculty includes: **Desmond Tutu, Warren Bennis, Larry Bossidy, Henry Kissinger, Pat Mitchell, Michael Abrashoff, and Marian Heard**, to name a few.



OCTOBER 26-29, 2003 • PALM DESERT, CA

Linkage brings you this world-class event, uniting the most senior HR executives with an elite group of HR product and service providers for an unprecedented "Meeting of the Minds". For 3.5 days you will be immersed in this high-powered learning environment combining **world-class speakers, Best-of-the-Best-Award Winners, Leader-to-Leader Councils**, and exclusive **networking opportunities** unmatched by any other program. With insight and visionary wisdom from keynote masters such as, **Desmond Tutu, Henry Kissinger, Larry Bossidy, Libby Sartain, and Boomer Esiason**, just to name a few, *The Linkage Inc. HR Masters Symposium* is the #1 HR event of 2003.

## **Women in Leadership SUMMIT**

NOVEMBER 3-5, 2003 • BOSTON, MA

*The Women in Leadership Summit* equips women leaders with the strategies, skills, and techniques to catalyze change, accelerate development, gain visibility within an organization, and create sustainable operating results. Held in San Francisco for five consecutive years, the event boasts more than 3,500 alumnae and hundreds of world-class speakers, and—now—Linkage is pleased to offer this extraordinary event in Boston. Confirmed Keynote Speakers include: **Barbara Corcoran, Gail Evans, Myrlie Evers-Williams, Goldie Hawn, and Lt. Gen. Claudia Kennedy**.

## LINKAGE DISTANCE LEARNING

### *Imagine Bringing These Speakers LIVE into Your Organization*



#### **Ken Blanchard** on **Excellence in Leadership and Management**

September 24, 2003  
11:00am - 12:30pm Eastern Time

#### **Special 2-hour program on Strategic Leadership**

October 14, 2003 • 11:00am - 1:00pm Eastern Time



#### **Rosabeth Moss Kanter** on **The Keys to Leading and Managing Change**

and



#### **Peter Senge** on **Strategy and Systems Thinking**



#### **Larry Bossidy** on **Execution**

October 27, 2003  
11:00am - 12:30pm Eastern Time



#### **Dan Goleman** on **Leadership and Emotional Intelligence**

November 19, 2003  
11:00am - 12:30pm Eastern Time



#### **Louis Gerstner** on **Organizational Transformation**

December 2, 2003  
11:00am - 12:30pm Eastern Time

For more information please call **781.402.5555**,  
contact your Linkage Account Representative,  
or visit [www.linkageinc.com/dis/](http://www.linkageinc.com/dis/)

## THE 2004 LINKS FACULTY

The LINKS faculty consists of **more than 500** thought leaders, bestselling authors, business school professors, expert trainers, best-in-class facilitators, and leaders of distinction from all fields. Among those that we are inviting include the following, each of whom has appeared on at least one Linkage program since the year 2000:

**MICHAEL ABRASHOFF** former Naval Commander

**MADELEINE ALBRIGHT** former US Secretary of State

**WARREN BENNIS** acclaimed leadership expert and author

**BENAZIR BHUTTO** former Prime Minister of Pakistan

**KEN BLANCHARD** author, *The One Minute Manager*

**LARRY BOSSIDY** former chairman and CEO, Honeywell International

**BILL BRADLEY** former US senator

**MARCUS BUCKINGHAM** author, *First, Break All the Rules*

**STEVEN COVEY** author, *The Seven Habits of Highly Effective People*

**MYRLIE EVERS-WILLIAMS** former chairperson, The NAACP

**MARSHALL GOLDSMITH** acclaimed coaching expert

**DANIEL GOLEMAN** author, *Emotional Intelligence*

**GARY HAMEL** author, *Competing for the Future*

**MICHAEL HAMMER** author, *Reengineering the Corporation*

**FRANCES HESSELBEIN** president and CEO, The Peter Drucker Foundation

**BETSY HOLDEN** co-CEO, Kraft Foods, Inc.

**JON KATZENBACH** author, *The Wisdom of Teams*

**ROSABETH MOSS KANTER** professor, Harvard Business School

**CLAUDIA KENNEDY** first female 3-star general, US Army

**TOM PETERS** author, *In Search of Excellence*

**MICHAEL PORTER** author, *Competitive Advantage*

**ANNA QUINDLEN** columnist, *Newsweek*

**ROBERT REICH** former US Secretary of Labor

**ANN RICHARDS** former governor of Texas

**TIM SANDERS** chief solutions officer, Yahoo!

**HOWARD SCHULTZ** chairman and chief global strategist, Starbucks

**PETER SENGE** author, *The Fifth Discipline*

**ROOSEVELT THOMAS** president, The American Institute for Managing Diversity

**NOEL TICHY** author, *The Leadership Engine*

**MARGARET WHEATLEY** author, *Leadership and the New Science*

Announcing a **powerful membership** for leadership development in 2004...

# LINKS

The smart way to develop your leaders and managers

## THE LINKS SOLUTION

Every organization's leadership curriculum is unique. Whether the need is to complement your existing in-house offerings with broad exposure to the range of leadership development topics, or to rely more fully on an outsourced solution, LINKS is your pivotal resource.

The LINKS solution is:

- **Comprehensive**, serving your large, diverse population of leaders and managers from the line and HR/OD
- **Flexible**, providing your leaders and managers with rich content through a variety of learning vehicles
- **Leading-edge**, driving innovation among your leaders and managers through multiple points of access and world-class thought leaders
- **Value-driven**, giving you and your organization an incomparable ROI

## THE LINKS BENEFITS AND VALUE

As a member of LINKS for 2004, your organization receives...

- **40 seats at 10 LINKS Summits and Institutes**, providing dynamic learning experiences at world-class gatherings of "the best of the best"
- **8 LINKS Broadcasts**, providing broad-based exposure to leading-edge thinking on business and leadership via state-of-the-art technology
- **10 LINKS Development Guides**, providing electronic access to all of the content introduced at the integrated summits, institutes, and broadcasts
- **LINKS Leadership Development Resources**, providing you and your team with assessment, one-on-one consultation, and other resources that set you up for success with LINKS

...all for \$27,500.

**40 SEATS AT  
10 SUMMITS AND INSTITUTES  
PLUS 8 BROADCASTS  
PLUS 10 DEVELOPMENT GUIDES  
FOR \$27,500**

## THE 2004 LINKS SUMMITS & INSTITUTES

The Women in Leadership Summit  
San Francisco, CA • February 9-11, 2004

The Summit on Driving Growth:  
Leading and Managing the Top Line  
Orlando, FL • March 2004

The Leading Diversity Summit  
Atlanta GA • April 26-29, 2004

The Summit on Driving Effectiveness:  
Leading and Managing Strategic Change  
Chicago, IL • May 2004

The Best of Organizational  
Development Summit  
Chicago, IL • May 2004

The Summit on Driving Efficiency:  
Leading and Managing the Bottom Line  
Boston, MA • June 2004

The Summit on Driving Productivity:  
Leading and Managing  
People and Performance  
Washington, DC • September 2004

The Next Generation Leadership Summit:  
Developing Tomorrow's Leaders Today  
Washington, DC • September 2004

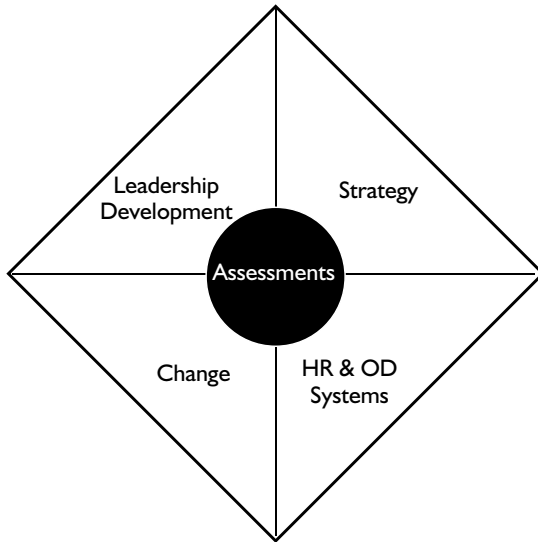
The Women in Leadership Summit  
Boston, MA • October 2004

The Global Institute for  
Leadership Development  
San Diego, CA • October 2004

## LINKAGE CONSULTING

Linkage's Strategic OD consultants specialize in helping you create change within your company while also developing leaders and learning at all levels in the organization.

We work in a learning partnership by developing a clear understanding of your vision—your challenges, goals and expectations for success—and linking that vision to our best practices, tools, and expert resources. Our consultants not only possess thought leadership but also years of industry experience.



### DO YOU WANT TO...

- Accelerate organizational alignment around your vision, values, and strategy?
- Increase the productivity and profitability of your organization through strategic change initiatives that engage your people and create commitment to change?
- Tighten the connection between your firm's strategy and your leadership development efforts?
- Increase performance of your senior team?
- Heighten the impact of the HR, OD, and Training functions within your organization, establishing them as strategic partners to the business?
- Increase the learning that takes place inside your organization?

**LINKAGE CONSULTANTS  
WILL HELP YOU MAKE IT HAPPEN.**

***Linkage Consulting...***  
***No longer the best kept secret in consulting.***

## LINKAGE ASSESSMENTS

### THE GROUNDWORK FOR IMPROVED PERFORMANCE

Change, development, and growth are at the heart of improved individual, team, and organizational performance.

Partner with Linkage Consulting to design individual, team, and organizational assessment solutions for maximizing efficiency, accuracy, and impact. Benefit from Linkage's extensive experience in employee communications, training, performance management, leadership development, and succession planning to ensure the long-term impact of your initiative, and the easy integration of your assessment solution with your current human resource and development systems.

Linkage's range of online or paper-based assessment instruments includes:

- **THE LAI™**  
(THE LEADERSHIP ASSESSMENT INSTRUMENT)  
Measures the critical capabilities required for high-performance leadership
- **THE C-SAIL™**  
(THE COMMUNICATIONS STYLES AND ABILITIES INVENTORY FOR LEADERS)  
Measures three key communication abilities and ten communication style tendencies to provide a snapshot of your communication capabilities and areas for development
- **THE COMPLETE CONSULTANT™**  
Enables HR/OD professionals to clarify their consulting roles, target their development efforts, and direct their behaviors to better drive organizational goals
- **THE ESSENTIAL COACH™**  
Describes in clear, direct, and operational language the day-to-day coaching behaviors and competencies demonstrated by superior leaders and managers
- **THE HIPLAY™ TEAM ASSESSMENT**  
Designed to help teams understand the changes needed to achieve breakthrough performance
- **THE AIM™**  
(THE ASSESSMENT INSTRUMENT FOR MANAGERS)  
Enables managers and supervisors to assess their capability in sixteen key components of successful management

# LINKAGE BOOKS, FORUMS, AND WEBINARS

## BOOKS

Linkage Press publishes books that detail what the world's leading practitioners are doing by way of Leadership Development, Organization Development, and Human Resources Development. They help senior executives, practitioners, students, and managers to immediately analyze, design, develop, support, and evaluate their organization's initiatives.

These books and handbooks have received critical acclaim by leading experts, senior executives, and thought leaders around the world as being highly informative, providing an exceptional amount of detailed and clearly written research, and in-depth information at an unusually low price. They include all of the tools, instruments, models, forms, and benchmarking information necessary to successfully implement a best practice initiative. Some of our recent books include:



**Click! Communicating with Magic at Work and in Life,**  
Phil Harkins..... \$19.95



**Powerful Conversations: How High Impact Leaders Communicate**  
Phil Harkins, foreword by Warren Bennis ..... \$24.95



**Best Practices in Leadership Development Handbook**  
Louis Carter, David Giber, Marshall Goldsmith, Warren Bennis ..... \$65.00

### PLUS COMING THIS FALL!

- **Profiles in Coaching 2004: A Handbook of Best Practices, Approaches & Trends Shaping Executive & Leadership Coaching Today**
- **Profiles in Women in Leadership**

To purchase any of these books please visit [www.linkageinc.com](http://www.linkageinc.com) or call 781.402.5555.

## FORUMS

Each quarter, Linkage hosts **Regional Benchmarking & Research Forums** to enhance the learning and networking opportunities on targeted HR, leadership, and OD topics of strategic importance to our clients.

During these events you will have the opportunity to participate in case driven panel discussions, get a comprehensive forum participant guide to help transfer learning back to your job, and benchmark your HRD practices with other leading organizations.

Typically, 30 executives from leading organizations in the local area attend Linkage, Inc. forums to network, share experiences, and learn from the presenters and participants.

The forums are based in four regions of the U.S.: the Northeast, Southeast, Central, and West Coast. The regional format provides participants with the opportunity to build continuing relationships with companies in their region.

### FALL FORUM SCHEDULE

- **Innovations in Leadership Development\***  
September 24, 2003 - Boston
- **Coaching Leaders/Executive Coaching**  
October 2, 2003 - Washington, DC
- **Using Coaching & Mentoring System for Enhanced Performance**  
October 8, 2003 - Chicago
- **Strategic OD and Leadership Development**  
October 21, 2003 - Newport Beach
- **Keys to Effective Succession Management**  
October 22, 2003 - New York
- **Business Showcase**  
November 12, 2003 - Minneapolis
- **HR as a Business Partner**  
November 13, 2003 - Denver

*\*The September 24, 2003 event will have a live satellite feed from the Distance Learning event-Ken Blanchard: Excellence in Leadership & Management.*

For more information or to register, please visit [www.linkageinc.com](http://www.linkageinc.com) or call 781.402.5555.

## WEBINARS

### LINKAGE INC.'S EXCELLENCE IN HUMAN RESOURCE DEVELOPMENT SERIES

#### LIVE via THE WEB!

Providing human resource development professionals with world-class thinking in the latest strategies and solutions to drive organizational performance

### ABOUT LINKAGE INC.'S EXCELLENCE IN HUMAN RESOURCE DEVELOPMENT SERIES

Linkage is pleased to provide human resource development professionals with cost-effective programs on leadership and organizational development taught by the leading experts. Each session will showcase tools, techniques and strategies to:

- Create innovative solutions to your most imperative business objectives
- Develop revolutionary strategies to impact business results
- Motivate your team to their peak performance

### UPCOMING SPEAKERS INCLUDE:



**Richard Boyatzis** on  
**Primal Leadership**  
September 16, 2003



**Sally Helgesen** on  
**Developing Women Leaders**  
November 2003

### RECENT SPEAKERS INCLUDE:



**Jim Kouzes** on  
**Key Leadership Challenges**  
May 14, 2003



**William Bridges** on  
**Making the Most of Transition**  
June 18, 2003



**Bob Nelson** on  
**Building a Culture of Recognition**  
August 13, 2003

For more information or to register, please visit [www.linkageinc.com](http://www.linkageinc.com) or call 781.402.5555.

# LINKAGE CALENDAR OF EVENTS: SEPTEMBER 2003 - MAY 2004

| TRAINING PROGRAMS  | NORTHEARN REGION                                      | CENTRAL REGION                      | SOUTHERN REGION                                   | WESTERN REGION                  |
|--|---|-------------------------------------|---|---------------------------------|
| Advanced Consulting Skills   | Boston 4/5-6  | Chicago 9/29-30, 12/4-5, 5/13-14    |   |                                 |
| AME: Assessing, Measuring, and Evaluating the Impact of Training             | New York 11/19-20                                     | Chicago 10/29-30, 2/4-5             |   |                                 |
| The Certification Program for Leading in Challenging Times: Shackleton's Way |   | Chicago 12/9-10                     | Atlanta 9/17-18                                   | San Francisco 4/29-30           |
| Coaching Women Leaders   | Boston 10/17<br>New York 12/12                        |                                     | Atlanta 3/26<br>Washington, DC 5/20               |                                 |
| The Coaching Leaders Certification Program                                   | Boston 10/14-16, 1/27-29<br>New York 12/9-11, 4/27-29 | Chicago 11/11-13                    | Atlanta 11/5-7, 3/23-25<br>Washington, DC 5/17-19 | San Francisco 9/23-25, 3/2-4    |
| Leading Through Communication: The Linkage Communication Clinic              | Boston 4/13-15<br>New York 12/10-12                   |                                     | Washington, DC 11/5-7                             | San Diego 9/16-18               |
| Consulting Skills for HR Professionals                                       | Boston 10/8-9, 3/4-5                                  | Chicago 12/2-3, 5/11-12             |   | San Francisco 11/3-4            |
| Designing and Implementing Action Learning                                   | New York 10/8-9<br>Boston 3/18-19                     | Chicago 9/8-9, 12/3-4, 5/4-5        |   |                                 |
| Designing and Implementing Leadership Development Programs                   | Boston 12/17-18, 4/7-8                                | Chicago 11/12-13, 1/22-23           | Washington, DC 10/28-29<br>Atlanta 2/18-19        | San Francisco 5/26-27           |
| Designing and Implementing Succession Management Systems                     | Boston 5/12-13  | Chicago 4/15-16                     |   |                                 |
| Developing a Sustainable Mentoring System                                    | Boston 9/8-9, 3/2-3                                   | Chicago 10/20-21, 4/22-23           | Atlanta 12/16-17                                  | San Francisco 11/19-20          |
| Developing Women Leaders: A Women in Leadership Workshop                     | Boston 5/24-25  | Chicago 4/1-2                       |   |                                 |
| Driving a Values-Based Culture   | Boston 5/5-6  | Chicago 3/4-5                       |   | San Francisco 12/9-10           |
| Interpersonal Effectiveness: Enhancing Your Emotional Intelligence           | Boston 9/29-30, 3/24-25                               | Chicago 12/3-4, 5/24-25             | Washington, DC 11/17-18                           |                                 |
| Influencing for Impact: A Women in Leadership Workshop                       | Boston 11/10-11                                       | Chicago 10/1-2, 2/11-12             | Atlanta 9/16-17<br>Washington, DC 4/20-21         | San Francisco 12/2-3            |
| Introduction to Organizational Design  | Boston 1/22-23<br>New York 5/17-18                    | Chicago 9/22-23, 12/8-9 3/9-10      | Atlanta 10/21-22<br>Washington, DC 2/26-27        | San Francisco 11/11-12, 4/5-6   |
| Leadership-Level Facilitation  | New York 9/23/25<br>Boston 12/3-5                     | Chicago 11/4-6, 3/29-31             | Atlanta 5/12-14                                   |                                 |
| Leading Across Boundaries  | Boston 2/23-24  | Chicago 12/17-18, 4/6-7             | Atlanta 11/12-13                                  |                                 |
| Leading in Challenging Times: Shackleton's Way                               | Boston 10/28, 3/16                                    |                                     | Atlanta 5/11                                      |                                 |
| Leading Organizational Transition Certification Program                      | Boston 10/22-24                                       | Chicago 12/15-17, 5/19-21           |   | San Francisco 3/9-11            |
| Management Skills: Driving Performance                                       | Boston 11/20-21, 3/29-30                              | Chicago 9/29-30                     |   |                                 |
| Management Skills: Motivating Individuals & Teams                            | Boston 12/9-10, 4/29-30                               | Chicago 10/27-28                    |   |                                 |
| Management Skills: Leading as a Manager                                      | Boston 9/18-19, 12/11-12, 5/18-19                     |                                     |   |                                 |
| Managing Organizational Transitions  | Boston 11/13-14                                       | Chicago 4/13-14                     | Washington, DC 2/10-11                            | San Francisco 9/29-30           |
| Organizational Analysis and Design   | Boston 10/29-30, 4/27-28                              | Chicago 9/24-25, 12/10-11, 3/11-12  | Washington, DC 9/8-9, 1/27-28                     | San Francisco 11/13-14          |
| Pathways: The Linkage Executive Leadership Program                           | Boston 12/15-17                                       | Dallas 10/1-3<br>Chicago 11/12-14   | Washington, DC 9/16-18<br>Atlanta 3/10-12         | San Francisco 5/5-7             |
| Powerful Conversations for Building Commitment                               | Boston 9/22-23, 2/9-10                                | Chicago 11/17-18, 5/6-7             |   |                                 |
| Risk Taking & Decision Making: A Women in Leadership Workshop                | Boston 10/16-17                                       | Chicago 11/19-20, 3/18-19           | Washington, DC 12/16-17                           | San Francisco 2/26-27           |
| Strategic Thinking   | Boston 12/15-16<br>New York 4/1-2                     | Chicago 11/5-6, 2/26-27             | Atlanta 1/29-30<br>Washington, DC 9/22-23         | San Francisco 10/22-23, 5/11-12 |
| Systems Thinking   | Boston 11/17-18                                       | Chicago 10/15-16, 12/15-16, 5/26-27 | Washington, DC 9/16-17                            | San Francisco 3/30-31           |

## CONFERENCES, SUMMITS, AND INSTITUTES

|  |               |                 |                   |                            |
|--|---------------|-----------------|-------------------|----------------------------|
| The Global Institute for Leadership Development                            |               |                 |                   | Palm Desert 10/26-31, 2003 |
| The Linkage, Inc. HR Masters Symposium 2003                                |               |                 |                   | Palm Desert 10/26-29       |
| Women in Leadership Summit   | Boston 11/3-5 |                 |                   | San Francisco 2/9-11       |
| The Summit on Driving Growth: Leading and Managing the Top Line            |               |                 | Orlando March '04 |                            |
| The Summit on Leading Diversity  |               |                 | Atlanta 4/26-29   |                            |
| The Best of the Organizational Development Summit                          |               | Chicago May '04 |                   |                            |
| The Summit on Driving Effectiveness: Leading and Managing Strategic Change |               | Chicago May '04 |                   |                            |

## FORUMS

|  |                |                   |                     |                     |
|--|----------------|-------------------|---------------------|---------------------|
| Innovations in Leadership Development                      | Boston 9/24    |                   |                     |                     |
| Coaching Leaders/Executive Coaching                        |                |                   | Washington, DC 10/2 |                     |
| Using Coaching & Mentoring System for Enhanced Performance |                | Chicago 10/8      |                     |                     |
| Strategic OD and Leadership Development                    |                |                   |                     | Newport Beach 10/21 |
| Keys to Effective Succession Management                    | New York 10/22 |                   |                     |                     |
| Business Showcase  |                | Minneapolis 11/12 |                     |                     |
| HR as a Business Partner                                   |                | Denver 11/13      |                     |                     |

## DISTANCE LEARNING SERIES

|  |  |  |  |  |
|--|--|--|--|--|
| Ken Blanchard on Excellence in Leadership and Management - Broadcast 9/24      |  |  |  |  |
| Strategic Leadership with Rosabeth Moss Kanter & Peter Senge - Broadcast 10/14 |  |  |  |  |
| Larry Bossidy on Execution - Broadcast 10/27                                   |  |  |  |  |
| Dan Goleman on Leadership and Emotional Intelligence - Broadcast 11/19         |  |  |  |  |
| Louis Gerstner on Organizational Transformation - Broadcast 12/2               |  |  |  |  |

## WEBINAR SERIES

|   |  |  |  |  |
|---|--|--|--|--|
| Richard Boyatzis on Primal Leadership - 9/16              |  |  |  |  |
| Sally Helgesen on Developing Women Leaders - November '03 |  |  |  |  |